

AGENDA

Wednesday, June 18, 2008

- 8:30 a.m. – 9:00 a.m. Introductions and Overview
- 9:00 a.m. – 10:15 a.m. The Credit Crisis and Deleveraging
History
Current Status
Future Impacts
Developed Market Financials as Value Stocks
AIG
- 10:15 a.m. – 10:30 a.m. Break
- 10:30 a.m. – 11:20 a.m. The Credit Crisis (Continued)
Capital Markets – Overview and Issues
Scenarios
Relative Values in the Capital Markets
Large Cap Quality Growth Companies
- 11:20 a.m. – 2:00 p.m. City Club Lunch and Break
- 2:00 p.m. – 3:00 p.m. Capital Markets (cont.)
Private Equity and Commercial Real Estate
- 3:00 p.m. – 3:15 p.m. Break
- 3:15 p.m. – 4:30 p.m. Private Equity and Commercial Real Estate (cont.)

Thursday, June 19, 2008

- 8:30 a.m. – 10:15 a.m. The Developing Markets
- 10:15 a.m. – 10:45 a.m. Break
- 10:45 a.m. – 12:30 p.m. The Developing Markets (cont.)
Commodities
- 12:30 p.m. – 2:00 p.m. Lunch and Break
- 2:00 p.m. – 4:00 p.m. Commodities (cont.)
Impact of Technology and the Internet
- 4:00 p.m. – 4:30 p.m. Concluding and Summary comments